CIBFM

Centre For Islamic Banking, Finance And Management

اوتوريتي مونيتاري بروني دارالسلام

AUTORITI MONETARI BRUNEI DARUSSALAM

Financial Planning *Practitioners'* Programme

ADDRESSING THE NEEDS OF THE PUBLIC AND THE INDUSTRY

Financial planning is a fast growing field under the financial sector all over the world and our country is now seeing a spurt in growth of financial planning activities. There has also been an emergence of financial planners in the country with a myriad of titles and qualifications, which may make it difficult for the public to discern which qualification is more acceptable.

AMBD has appointed CIBFM to be the official Licensing Examination for the purposes of the licensing requirements under the Securities Markets Order, 2013.

Thus, the Financial Planning Practitioners' Programme (FPPP) was formulated specifically to address the licensing requirement for financial planners with the guidance and support of AMBD as well as TAP, to cover the minimum knowledge and skills expected of a competent financial planner. The workshop consists of two parts; theory and skills which will be followed by assessments to ensure the financial planners demonstrate the necessary knowledge and skills required to serve the public effectively.

COURSE CONTENT

Part 1 - Theory

Module 1:
Introduction to Financial Planning

Module 2:
Financial Statements and Financial Ratio Analysis

Module 3:
Cash Management and Budgeting

Module 4:
Time Value of Money

Module 5:
Risk Management and Insurance Planning

Module 6:
Investment Products and Investment Planning

Module 7:
Unit Trusts

Module 8:
Retirement Planning

Module 9:
Estate Planning

Module 10:
Code of Ethics and Regulatory Controls &Practices

WHO SHOULD ATTEND

- All interested to apply for licensing from AMBD under investment/investment-linked advice
- Staff who are selling investments and/or investment-linked insurances
- All who are interested to become a financial planner

FINANCIAL PLANNING PRACTITIONERS' PROGRAMME

Dates	Schedule
26-28 April 2017 (3 Days)	Theory
1-3 May 2017 (3 Days)	
5 May 2017 (9:00 AM)	2-hour written exam
8-10 & 17-19 May 2017 (6 Days)	Phase 2: Skills Training
22-23 May 2017 (2 days)	Skills assessment & knowledge application (as per time-table to be drawn up later)

* *Your fee includes workshop material, text book, refreshments & lunch, exam fees and certificate of achievement (upon successful completion).*
* *Payment must be made upon receipt of invoice issued by CIBFM.*
* *CIBFM operates a strict* ***NO CANCELLATION POLICY*** *after receipt of registerations from organisations. CIBFM reserves the right to cancel or postpone the programme should the minimum number of participants of 15 are not met.*
* *(Stakeholders are participants from MOF, AMBD and all domestic banks in Brunei Darussalam)*

Your investment in this programme is:

*Stakeholders	B$2,105 participant
Non-stakeholders	B$2,750 per participant

PLEASE FAX YOUR COMPLETED FORM TO: 2461 224 BY 14 APRIL 2017

FOR FURTHER ENQUIRY, PLEASE CALL AT 2461 221/223 OR EMAIL: registration@cibfmbrunei.com

Please register:
Approved by:

1	Name:
	Position:
	Email:
	Telephone:
2	Name:
	Position:
	Email:
	Telephone:
3	Name:
	Position:
	Email:
	Telephone:

Name:	
Position:	
Department	
Email:	
Tel No:	